

## David Toomey CV

Following 20 years in the Financial Services industry, in management roles in marketing, training and human resources development, David started his own training and development business in 1994, known as Apex Management Consultants Ltd. Apex has been a centre for OCR for NVQ's in Management, Customer Service, Training and Development, Sales Supervision and Insurance / Financial Services. A core service offered by Apex has been training financial services supervisors in the skills of assessment, coaching, identifying learning needs and performance management.

### Some recent consultancy assignments

#### Management training and development

Recent assignments have included the design and delivery of a variety of programmes including:

- supervisory training programmes for sales supervisors in financial service businesses
- training for owners of SME's on training planning
- assessment and internal verification of over 150+ NVQ candidates over an eight year period to OCR NVQ standards
- assessment of 50+ sales managers against internal company standards, including provision of one to one feedback to assist in their professional development.

#### Coaching

David works mainly as a coach with owner-managers of SMEs including:

- coaching on the development of training plans
- coaching with Modern Apprentices to develop customer service and problem solving skills
- coaching for individuals in an IFA network to assist them to carry out network and regulatory supervisory activities.

#### HR consultancy

- design and implementation of a performance appraisal system for mail room supervisors to assist in achieving Investors in People status
- design and implementation of a quality assurance system to meet Adult Learning Inspectorate standards, gaining a Grade 2 ("Good") at 2001 inspection for quality assurance of training activities.

#### Qualifications

MBA in Management at the City University Business School (CUBS); qualified assessor and internal verifier (units D32, D33 and D34); Fellow of the Chartered Insurance Institute; Diploma of the Chartered Institute of Marketing; Associate of the Society of Financial Advisers; Certificate in Mortgage Advice and Practice (CEMAP)

#### Other activities and interests